VA LEARNING UNIVERSITY

# VA TMS Domain Manager and Learning Manager Administrator Course

## Session 1: VA TMS Overview

Virtual Instructor-Led Training

Participant Guide

March 2014

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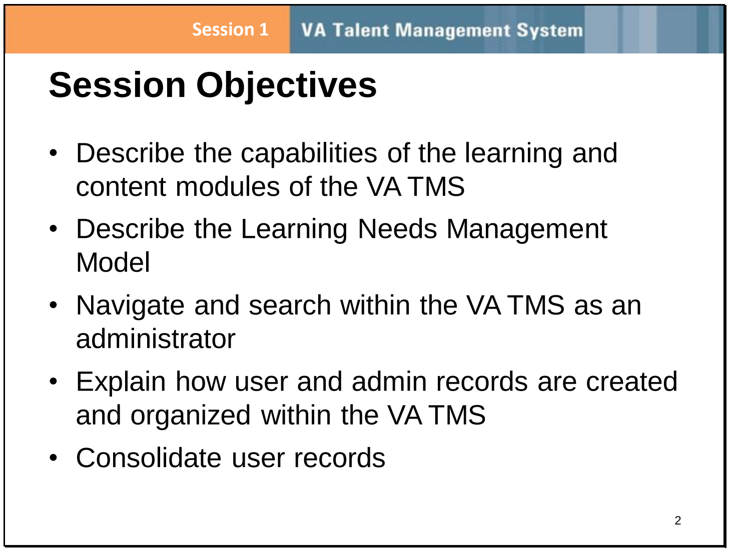
# 1.0 Training Content

## 1.1 *Session 1 Overview*


Slide 1: Session 1 Overview

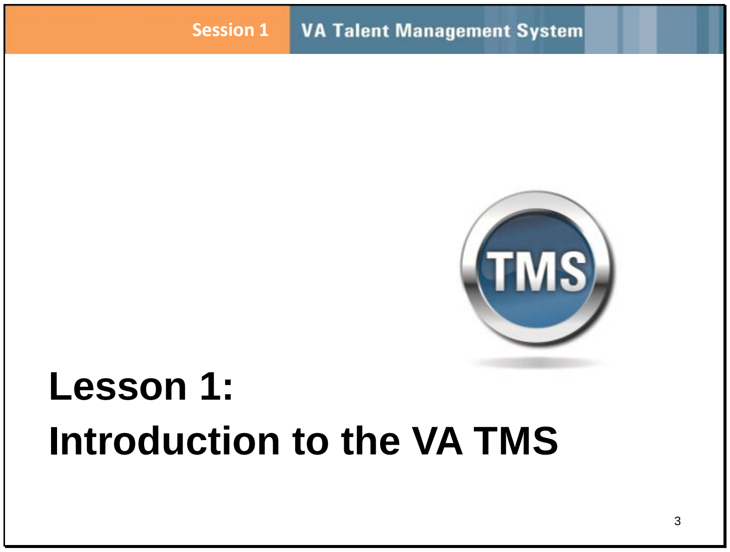
Notes:




Slide 2: Session Objectives

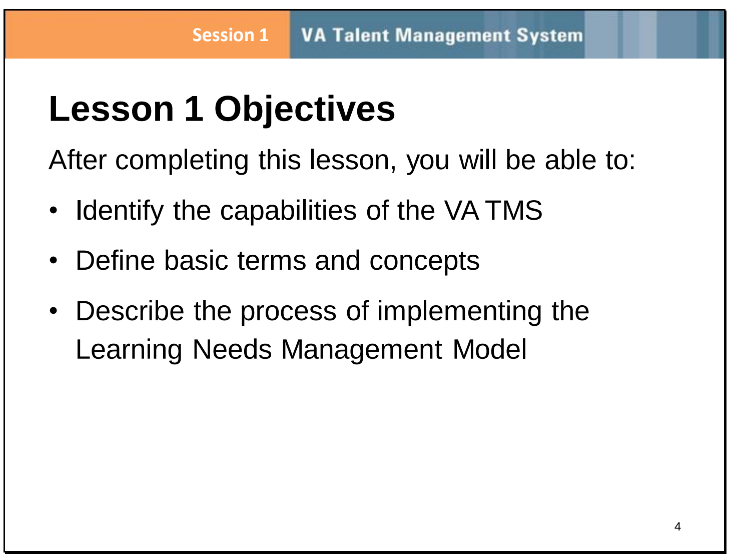
Notes:

## 1.2 *Lesson 1: Introduction to the VA TMS*




Notes:

Slide 3: Lesson 1: Introduction to the VA TMS

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Slide 4: Lesson 1 Objectives

Session 1 VA Talent Management System

## Introduction to the System

What is the VA Talent Management System (TMS)?

- Manages learning processes
- Manages third-party learning content
- Deploys course content and exams
- Handles auditing and reporting

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Slide 5: Introduction to the System

Notes:

Session 1 VA Talent Management System

## What Is the VA TMS?

VA TMS is similar to a college~~’s~~ registrar’s office. It coordinates and maintains schedules and records for:

- Students
- Instructors
- Administrators
- Classes
- Areas for concentrations

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Slide 6: What Is the VA TMS?

Notes:

Session 1 | VA Talent Management System

## What Does VA TMS Do?

VA TMS enables administrators to:

- Create and assign learning opportunities for their employees
- Schedule learning events
- View the completion status of employees
- Provide online learning resources


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Slide 7: What Does VA TMS Do?

Notes:

Session 1 | VA Talent Management System

## VA TMS User

- End user of the VA TMS
- Includes supervisors and organization owners
- Users can do the following in the VA TMS:
  - Register for training sessions
  - Launch online training
  - Manage To-Do Lists
  - Supervise other users who report to them

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Slide 8: VA TMS User

Notes:

Session 1 VA Talent Management System

## VA TMS Admin

- Administrator for the VA TMS
- Can have many different responsibilities depending on role, including:
  - Adding or editing users
  - Scheduling training
  - Enrolling users into training events
  - Giving users credit for completing training
  - Running reports

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Slide 9: VA TMS Admin

Notes:

Session 1 VA Talent Management System

## Key Terms

**Item**: An assignable unit whose assignment and completion can be tracked. It may be a learning or non-learning item.

**Curricula:** A group of one or more Items that can be assigned to users and have its completion status tracked as a group.

**To-Do List:** List of items assigned to a user that must be completed. It also contains the date by which each item should be completed.

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Slide 10: Key Terms

Notes:

Session 1 VA Talent Management System

## Key Terms

**Learning Event:** A user's participation in the completion of an item or external event. It also contains the date by which each item should be completed.

**Learning History:** A record of all recorded learning events for the user.

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Slide 11: Key Terms

Notes:

Session 1 VA Talent Management System

## Learning Needs Management Model

These steps should be followed to successfully implement the Learning Needs Management Model:

1. Identify learning needs (outside VA TMS Learning)
2. Add items in VA TMS Learning
3. Add curricula in VA TMS Learning
4. Assign learning needs to users
5. Record learning events

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Slide 12: Learning Needs Management Model

Notes:


Slide 13: User's View

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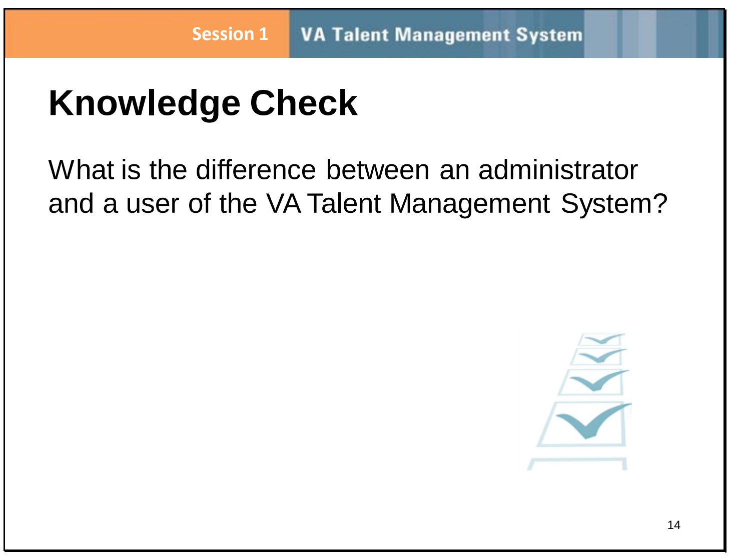


Slide 14: Knowledge Check

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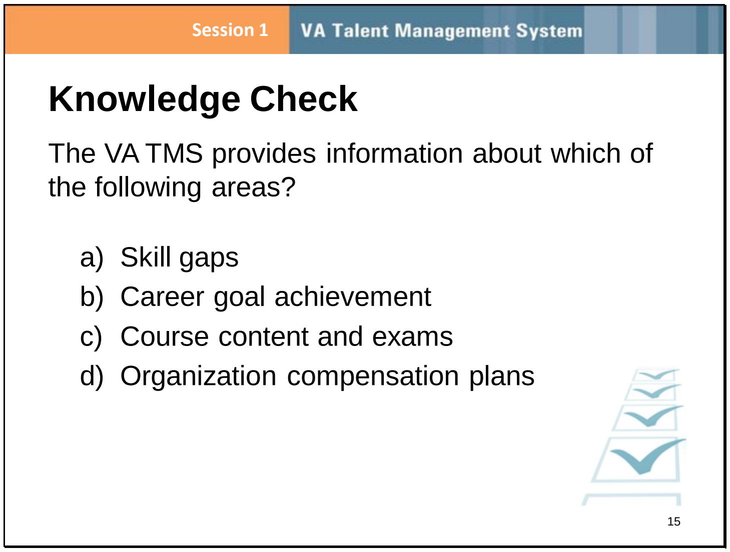


Slide 15: Knowledge Check

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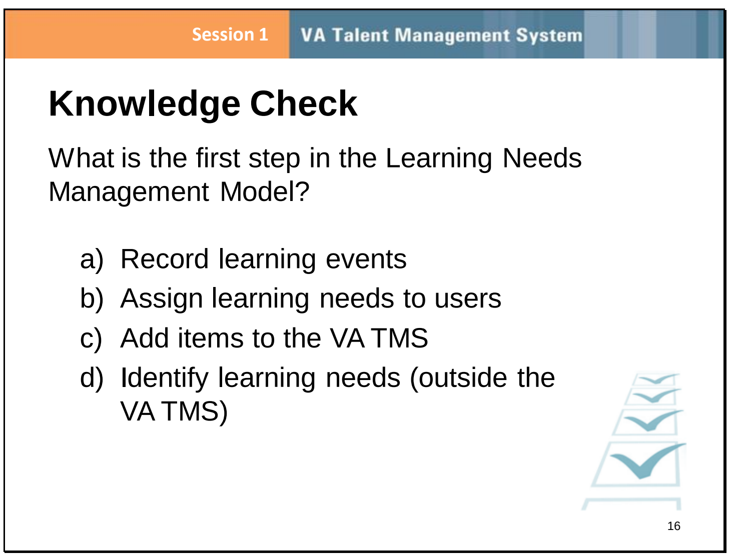
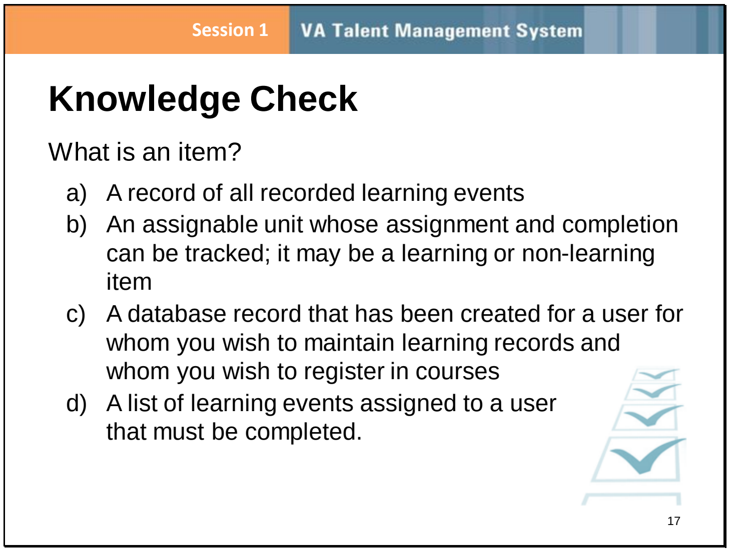



Slide 16: Knowledge Check

Notes:




Slide 17: Knowledge Check

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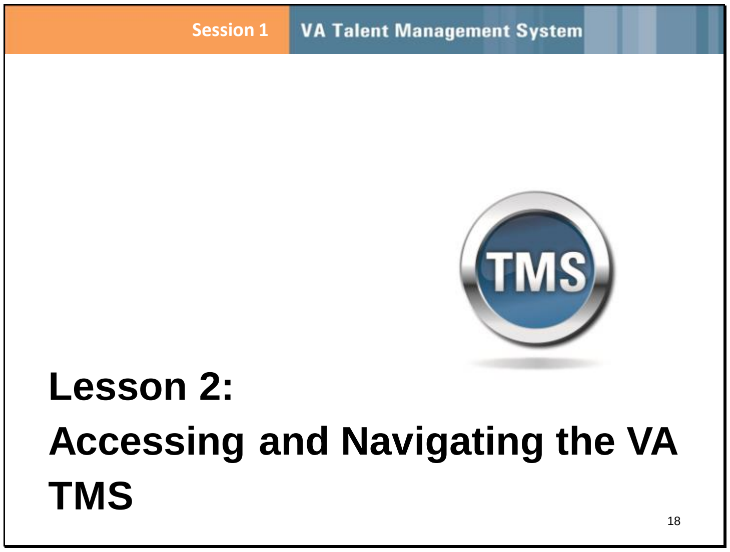
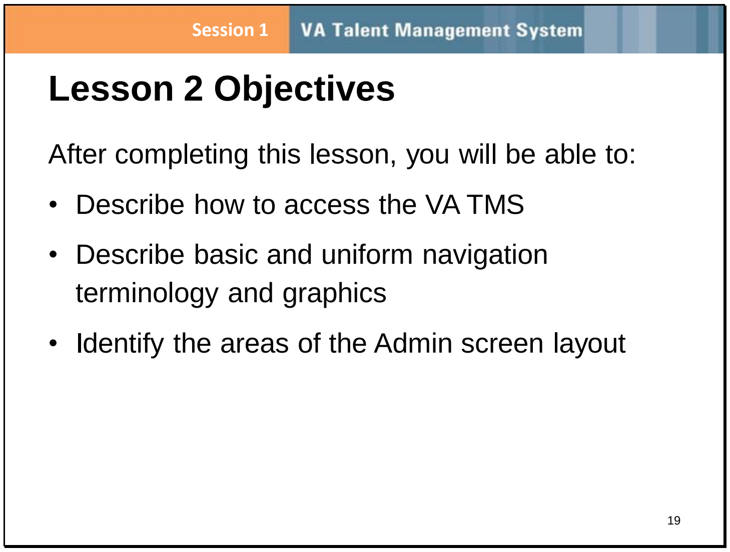
## 1.3 *Lesson 2: Accessing and Navigating the VA TMS*




Slide 18: Lesson 2: Accessing and Navigating the VA TMS

Notes:




Slide 19: Lesson 2 Objectives

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Slide 20: System Login

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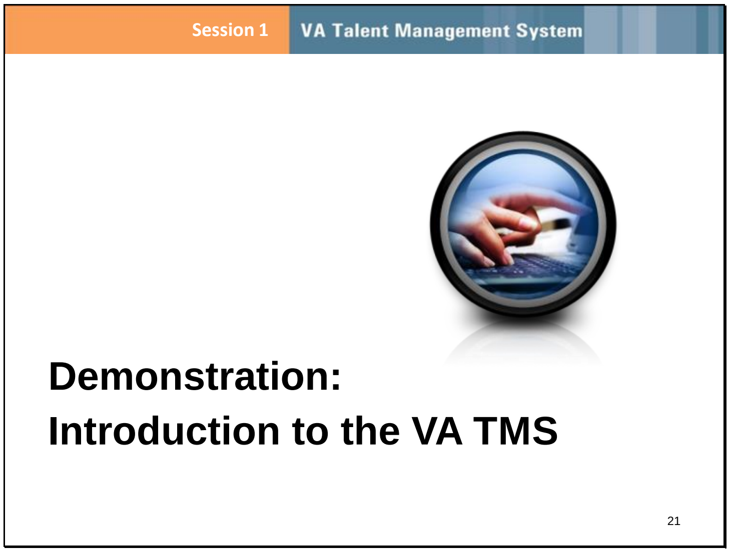



Slide 21: Demonstration: Introduction to the VA TMS

Notes:

### Demonstration: Introduction to the VA TMS

1. Enter **the URL** into your browser and press the **Enter** key or select **Go**. (The TMS login screen displays.)
2. Enter your **Admin ID** and **password**.
3. Press **Enter** or select **Sign In**. (The TMS Welcome screen displays.)
4. Discuss each of the following VA TMS features.

**Admin Home Page Layout**

There are four main sections of the admin home page:

1. **Interface Tabs:** Provide access to the different VA TMS interfaces
   - Select **Home** to access your user account interface
   - Select **My Employees** to access your supervisor interface and manage your subordinates
   - Select **Organization** to access to your organization owner interface and explore data (such as view item completions, learning projections, curriculum status, and registration status for a respective organization)
   - Select **Admin** to access your administrator account interface
2. **Main Menu:** Contains buttons to the primary functional areas in the VA TMS such as Users, Performance, Learning, etc. **NOTE:** Your functional area buttons may differ depending on the workflows and roles you are associated with. When a button is selected, its respective available options are displayed in the left menu frame.
3. **Welcome Area:** Includes relevant VA TMS updates and announcements
4. **Quick Links:** Allows easy access to commonly used functions

**Personalize Your Admin Experience—Configurable Home Page**

1. In the continuing effort to provide an application that meets each administrator's unique needs, the administrator Home page is configurable, including a new page layout option. Quick Links are now available from the Home page, along with a configurable Welcome area that can contain any information that needs to be imparted to administrators.
2. Admins can configure the layout for their Home pages using the **Choose a Different Layout** icon in the upper right to rearrange the two areas, Welcome and Quick Links. The VA TMS provides admins with six different layout configuration options. Additionally, the slide bar between the two areas can be moved to adjust the size of each area.

**Quick Links**

1. Quick links were traditionally predefined based on commonly used functions within the system; however, now any command available from the Search textbox can be configured to display in the Quick Links area, giving you access to whatever you do most.
2. Navigate to the **System Admin > Configuration > Quick Links Configuration** section to configure the Quick Links. After you make these quick links available (defaulted), you can choose to show or hide quick links on the Home page. This allows you to customize your own page to show the quick links that you most commonly work with.

3. The Home Page shows the quick links that are available. Start the process by selecting **Manage Quick Links** (pencil icon), which allows you to add or remove or move existing links and groups from the default configuration and to create new groups.
4. Additionally, Quick Links can be configured into groups that allow larger processes to be defined and accessed from within one area. This allows for the processes that are defined within the organization to be followed, allowing work to be done based on internal process, rather than following prescribed processes. Create Online Course and Create Instructor-Led Course are examples of groups that have been created.
5. Using the Manage Quick Links feature (**Home Page > Quick Links > edit** icon), admins can select from a list of available commands and add them to the list of Selected commands.
6. The quick links can be defined on a global level and then personalized by every admin, always following any assigned security permissions. The definition for each selected command is label driven.

**Guided Mode**

1. Typically, the purpose of using the guided mode is to provide less-experienced administrators with a guided process for completing routine, multi-step actions. The admin can select **Guide Me** on any group process and access that process from anywhere within the application. This allows the process to follow the admin and will only display once a guided mode has been initiated.
2. If you select the **Preferences** icon (blue spoked wheel) and then check the **Enable Guide Me Mode** checkbox in the general settings area, then the system places another Enable Guide Me Mode checkbox in each administrator's preferences.
3. If you check the **Enable Guide Me Mode** checkbox for your preferences, then the system allows you to select Use Guided Mode when you select a group of quick links on your Home page.

**The Button bar:**

Under the **Tab** bar is the **Button** bar. When a button is selected, its respective available options are displayed in the left menu frame. You can navigate to **Admin** > **Learning** > **Items**. Also in this top frame, admins can access references and reports.

The **References** button manages fields that you can use throughout the VA TMS, including calendars and time, geography, and physical resources.

The **Reports** button includes:

- Searching for and running reports
- Changing the description of reports
- Importing and exporting reports and libraries for customization in the Report Designer
- Publishing and unpublishing reports

You can also customize the way the **Button** bar appears. The **Collapse**/**Expand Main Navigation** buttons collapse or expand the button bar.

1. The **Preferences** icon changes your locale (language, date/time format, etc.) and time zone settings, and resets your password and security question/answer.
2. The **Check System** link checks your system for the necessary software to run the VA TMS.
3. The **Sign Out** link ends the current session.

**Left menu frame:**

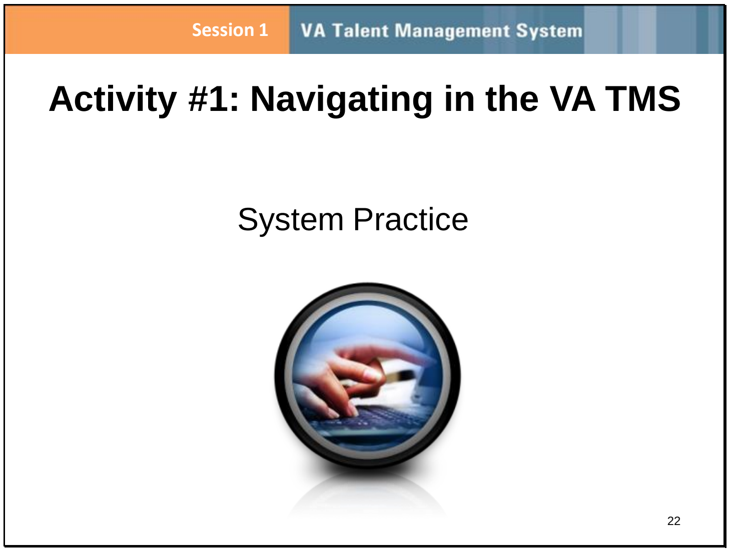
1. Show how the left menu frame often has more options available.  To see them, select the up and down arrows and plus and minus icons to expand menu options.
2. Based on the button selected in the **Button** bar, a related set of menu options will be displayed in the left menu frame.  If a menu item has subsections within it, a **Plus** icon is displayed.
3. Select the **Plus** icon to expand that menu option.  The **Plus** icon changes to a **Minus** icon and the expanded menu options are displayed.  Only one menu item can be expanded at a time.

**Content frame:**

1. When a left menu option is selected, the corresponding screen displays in the content frame.  This is the working area where searches are conducted to retrieve, view, and edit records.

   **NOTE:** The content frames are exactly the same as the LMS.  The wizards take you through the same processes.

2. **There are two features that often appear in the content frame:**
   - **Breadcrumbs** display at the top-left corner of the content frame and identify the area, section, subsection (if applicable), tab, and mode currently open.  Breadcrumbs may contain active links that facilitate navigation to previous screens
   - The **Help** icon displays at the top-right corner of each content frame.  Selecting this icon displays context-sensitive help for the specific section currently open, and opens the online help system with access to contents, index, search, and the system glossary




Slide 22: Activity #1: Navigating in the VA TMS

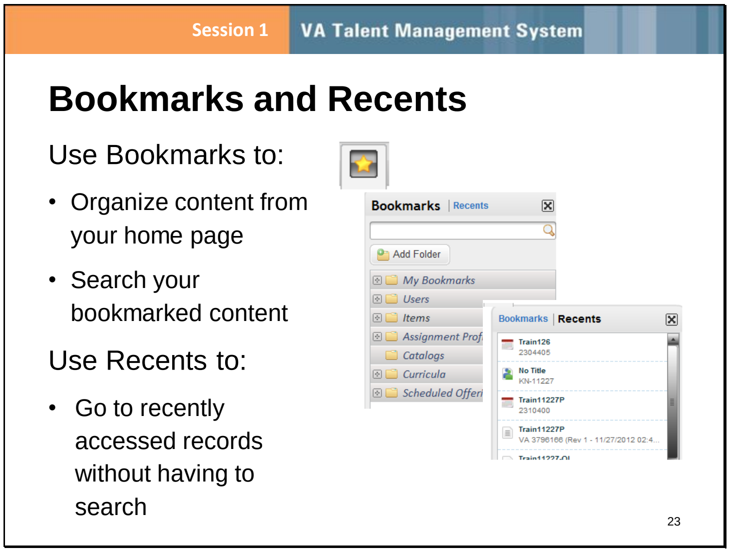
Notes:

### Activity #1: Navigating the VA TMS

1. Log in to the VA TMS as an administrator.
2. Perform a system check.
3. Navigate to **Preferences**.
4. Access the VA TMS reports.
5. Open the dialog box that allows you to customize the Admin Home Page.
6. Open the **Edit Quick Links** dialog via the **Pencil** icon.
7. Use the **Search** textbox (Awesome Bar) to access the screen where you can add items.

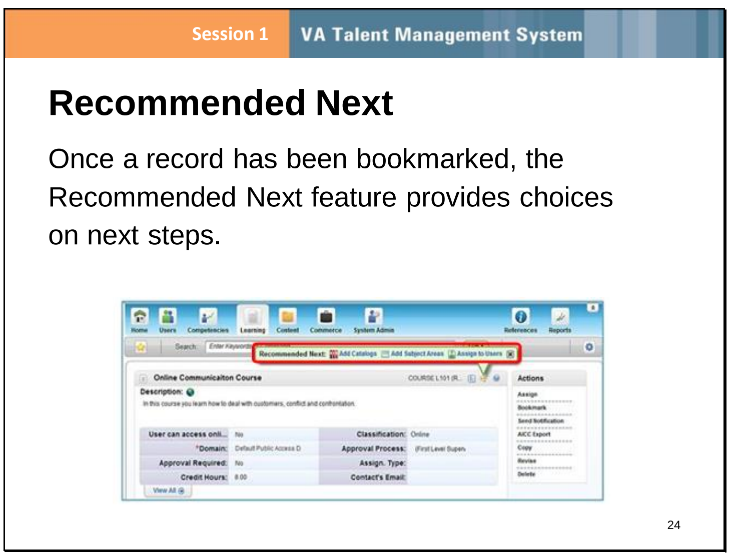
**Next, complete the following tasks:**

1. Find your **To-Do List**.
2. Locate the **Learning** button.
3. Locate the **System Admin** button.
4. Select the **Curricula** option in the left menu frame under Learning.
5. Find the **Organization** interface.
6. Search for the command for adding a new item.




Slide 23: Bookmarks and Recents

Notes:




Slide 24: Recommended Next

Notes:



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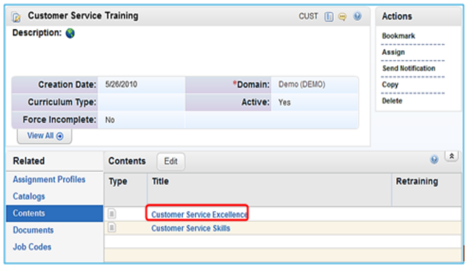
## Cross Entity Linking

Cross entity linking allows users to see associations related to a record that they are working within and to click over to view it.

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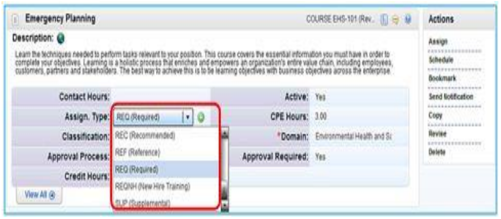
Slide 25: Cross Entity Linking

Notes:

Session 1 VA Talent Management System

## Record Layout Consolidation

- Commonly used record types can be accessed in a consolidated format to view and edit
- This allows better access to the information

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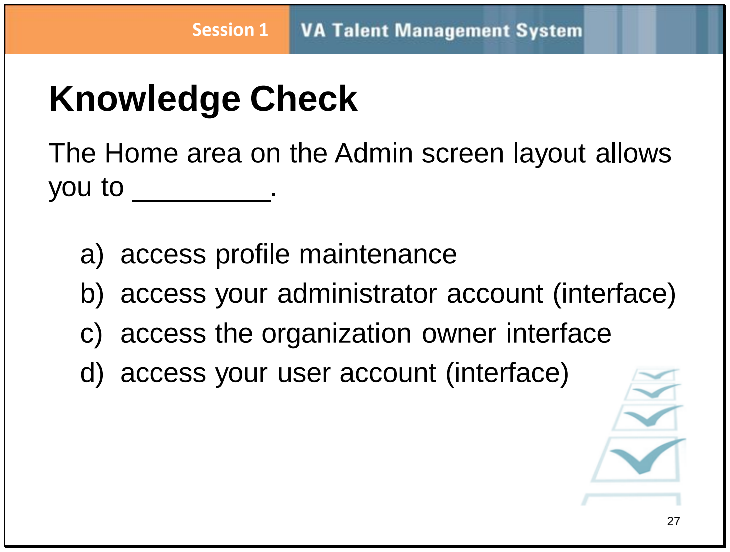
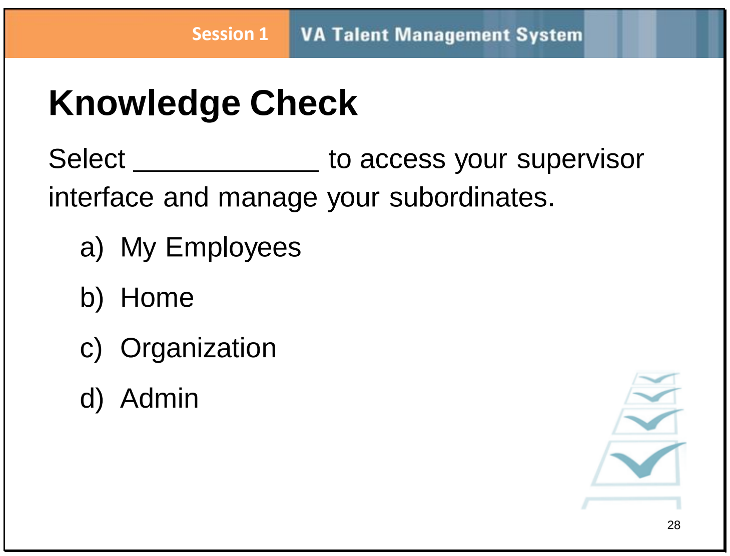
Slide 26: Record Layout Consolidation

Notes:



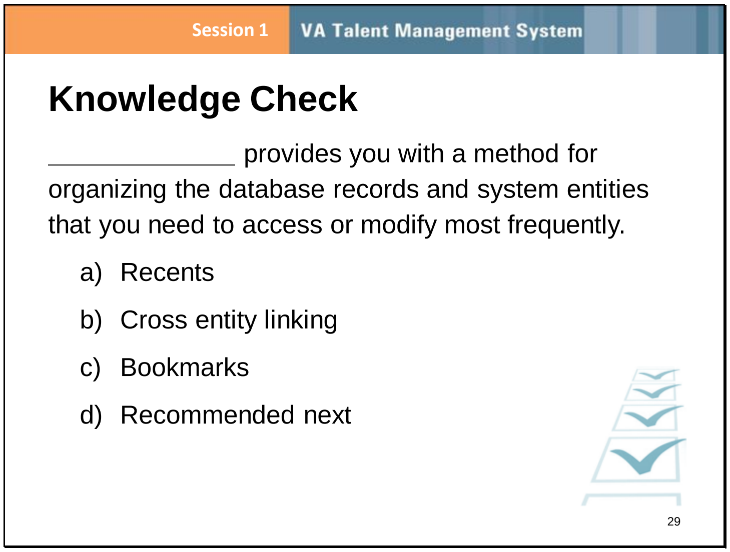

Slide 27: Knowledge Check

Notes:




Slide 28: Knowledge Check

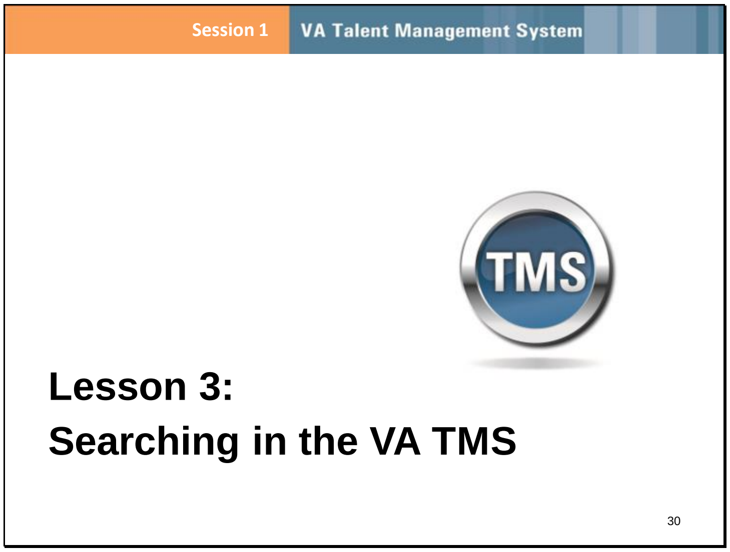
Notes:




Slide 29: Knowledge Check

Notes:

## 1.4 *Lesson 3: Searching in the VA TMS*




Slide 30: Lesson 3: Searching in the VA TMS

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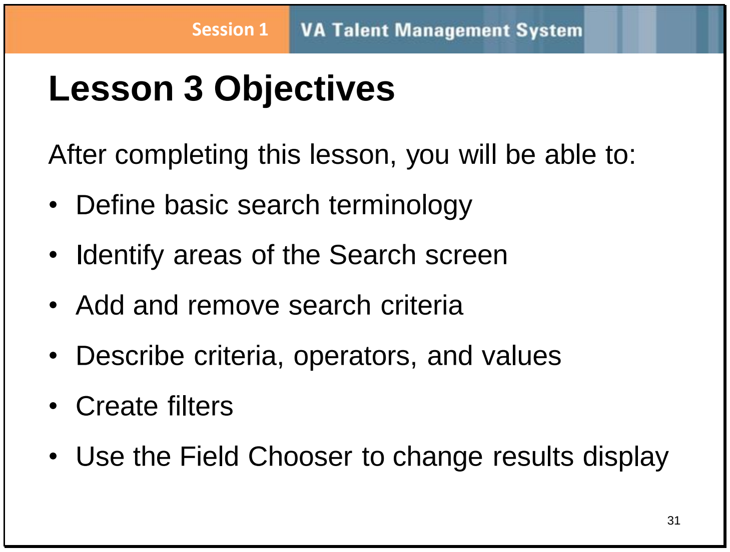


Slide 31: Lesson 3 Objectives

Notes:

Session 1 VA Talent Management System

## Searching

The search feature throughout the VA TMS is critical to most workflows in the system. Use the search feature to:

- Create and delete a search filter
- Add and remove criteria from your search filter
- Adjust the display of your search results
- Save your search to use later
- Sort your search results
- Export search results to Microsoft Excel

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Slide 32: Searching

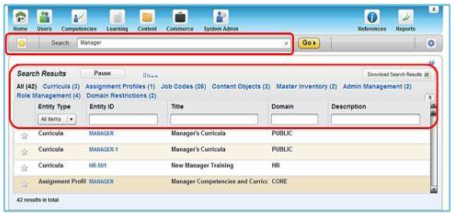
Notes:

Session 1 VA Talent Management System

## Keyword Searches

You can use the Search textbox to perform:

- Quick command searches
- Single searches
- Multiple searches



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Slide 33: Keyword Searches

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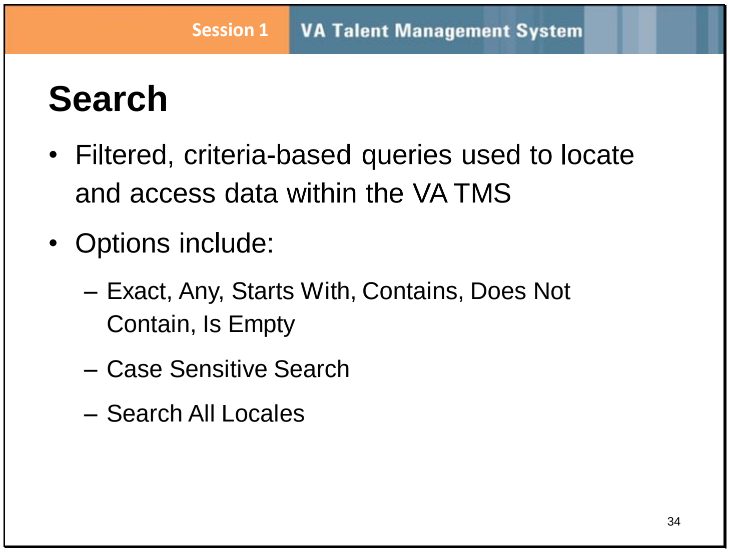
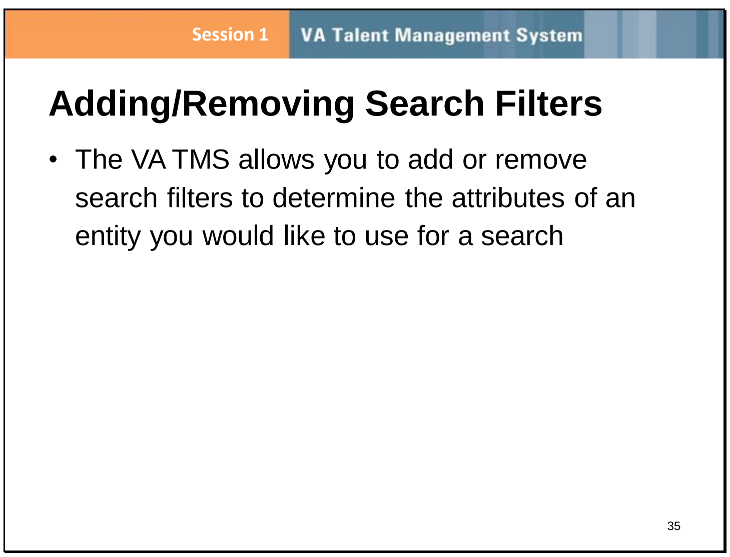


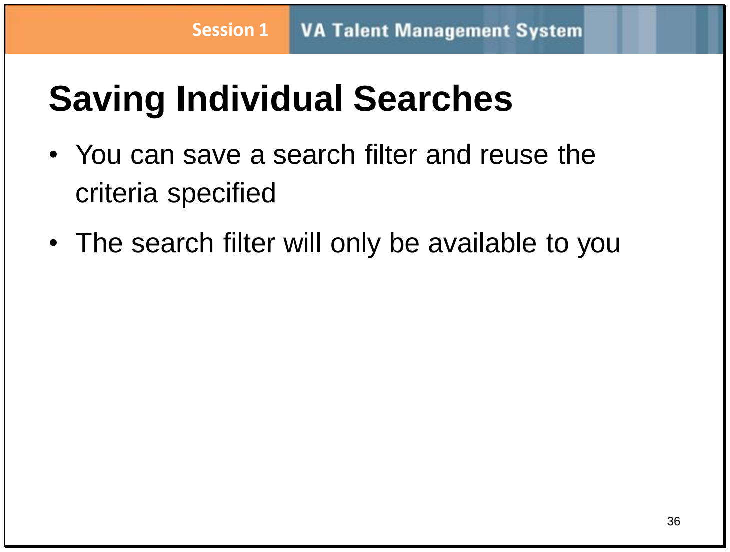

Slide 34: Search

Notes:




Slide 35: Adding/Removing Search Filters

Notes:




Slide 36:Saving Individual Searches

Notes:


Slide 37: Demonstration: Searching in the VA TMS

Notes:

## Demonstration: Searching in the VA TMS

**To add or remove the organization search filter:**

1. Navigate to **Users > Users**.
2. If necessary, select **Add/Remove Criteria** to add the Organization search criteria to the search screen.

   **NOTE:** Search criteria added to your search window will remain until you remove them.
3. The **Search Criteria** pop-up window displays.
4. Select the **Organization** checkbox.
5. Select **Select**.
6. The **Organizations** criteria displays on the **Users** search screen.
7. To create the filter on the criteria, select the Organization **Filter by Criteria** icon.
8. The **Create Filter** screen displays.
9. Enter a search value for an organization criterion.
10. Select **Search** to display your search results.
11. Select the checkbox(es) to select your choice(s) from the search results.
12. Select **Add to Filter**.
13. Your selected criteria will be displayed in the filter.
14. Confirm that your selection(s) are correct.
15. Select **Submit Filter**.
16. You are returned to your original search screen. You see that the organization search attribute has two (2) criteria selected for this filter.
17. You can modify this filter by selecting the **Filter by Criteria** icon, or you can clear the filter by selecting the **Clear Filter** icon.

**To show how a filter works by selecting from a list:**

1. If you don't know the exact job position ID, select **Search** in the **Search Job Positions** section of the **Create Filter** screen. You will see a list from which you can select one or more objects to populate the related field.
2. Select the check box(es) to select your choice(s).
3. Select **Add to Filter**. The selection is added to the search filter. You are returned to the **Filter** screen to view the filter you created.
4. Confirm your selection(s) are correct.
5. Select **Submit Filter**. You are returned to your original search screen. You will see that the job position search attribute has three criteria selected for this filter.

**To adjust the display of search results:**

1. Select **Field Chooser** in the search results section.
2. The **Field Chooser** pop-up window displays. Use this window to determine which attributes of the listed entities and columns to display in the search results. The first column always displays the record ID and is not editable. For some entities, the second column is not editable as well. You can add and/or remove other columns.
3. Select the attributes you want to display by entering the number of the column from the left in which you want to see the data. (Note that the column number you enter is sequential, e.g., 1, 2, 3, 4.) In this example, we want to show **Is Full-Time** in the fifth column and the **Region ID** in the sixth column.
4. Select **Submit** to see your search results.

**To sort your search results:**

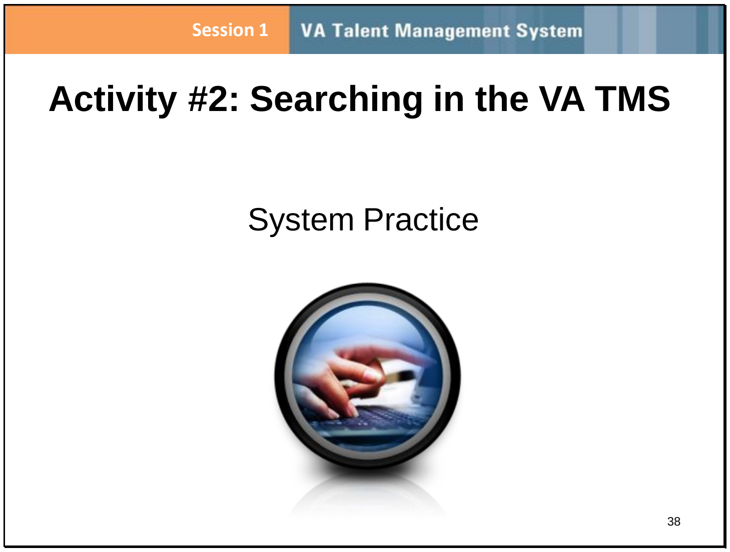
1. Once you have the results you are looking for, you can sort them based on key columns on your list (except the **Description** column/field).
2. To sort the list by an entity, find the column and select the header: an up-facing arrowhead indicates ascending order, A>Z; and a down-facing arrowhead indicates descending order, Z>A.

**To save a search:**

1. Select **Save As** at the bottom of the screen.
2. The system prompts you for an ID for your saved search and a brief description of the search.
3. Enter an ID with an intuitive description to make referencing it in the future easier.
4. Select **Submit**.

**To access your saved searches:**

1. Select **Saved Searches** at the upper right corner of the content frame.
2. Select the saved search you wish to conduct.
3. The selected search screen displays. The saved search ID and description are displayed at the top.

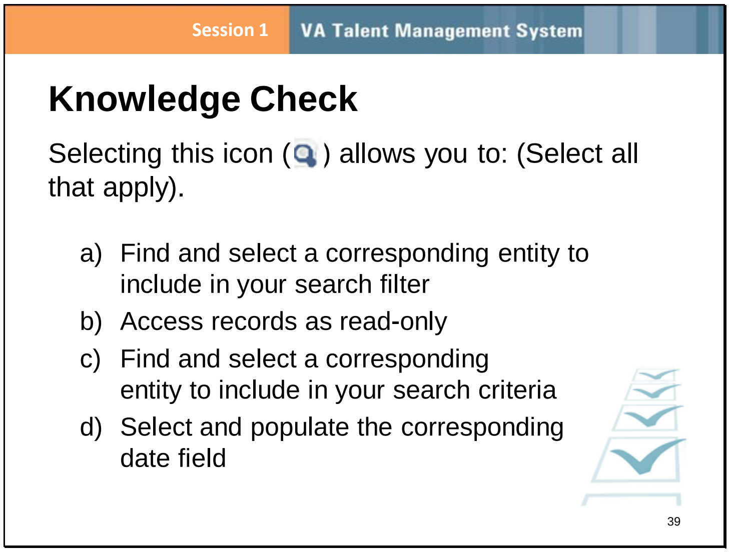



Slide 38: Activity #2: Searching in the VA TMS

Notes:

### Activity #2: Searching in the VA TMS

1. Go to the **Users Menu** tab.
2. Add **State** to the search criteria.
3. Clear your search and find all the users that are in VA.
4. Clear your search and search for all users that have a User ID starting with TEST.
5. Clear your search and find all users with “Rob” anywhere in their last names.
6. Save search #5.
7. Perform a search that will return all users that reside in VA or DC and have the last name “Johnson.”




Slide 39: Knowledge Check

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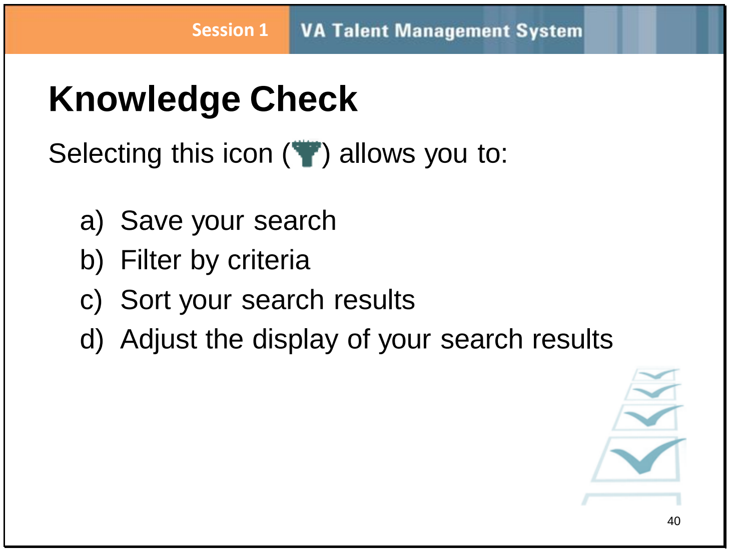


Slide 40: Knowledge Check

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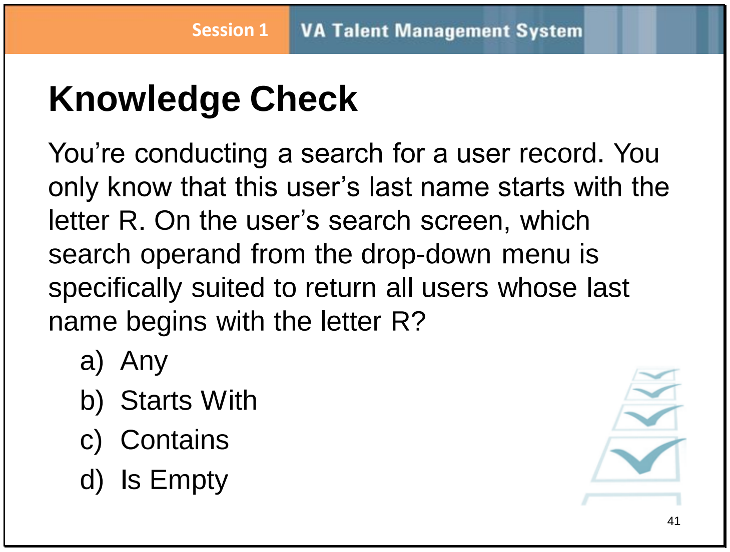


Slide 41: Knowledge Check

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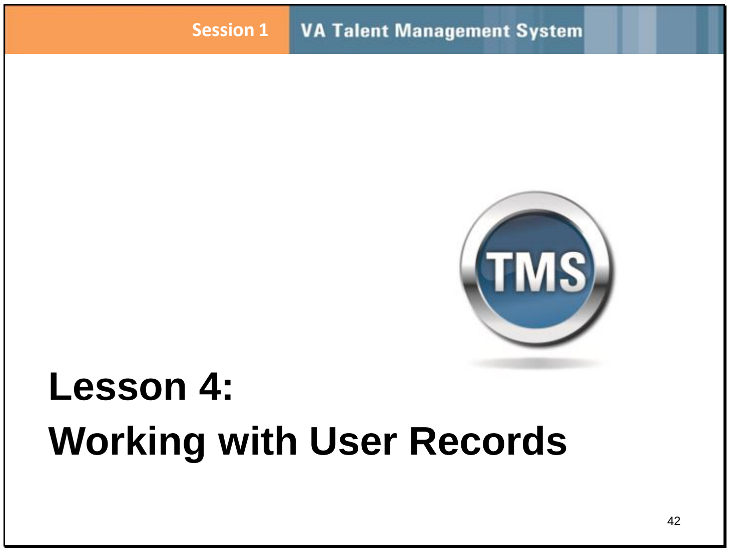
## 1.5 *Lesson 4: Working with User Records*




Slide 42: Lesson 4: Working with User Records

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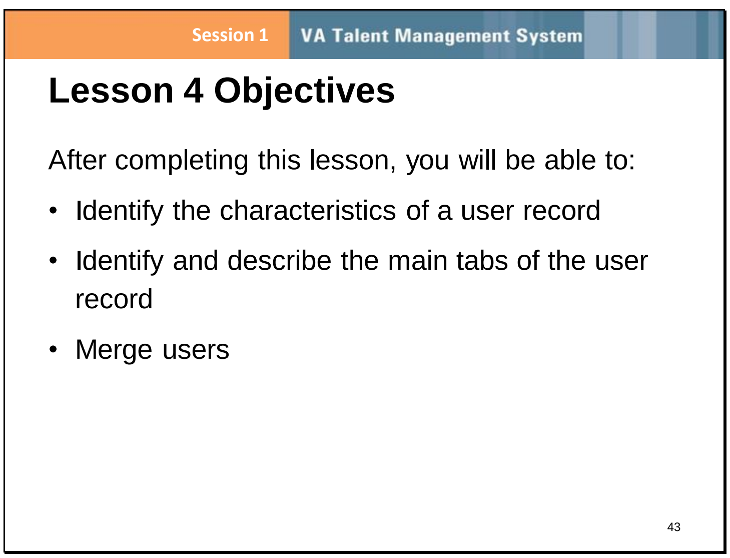


Slide 43: Lesson 4 Objectives

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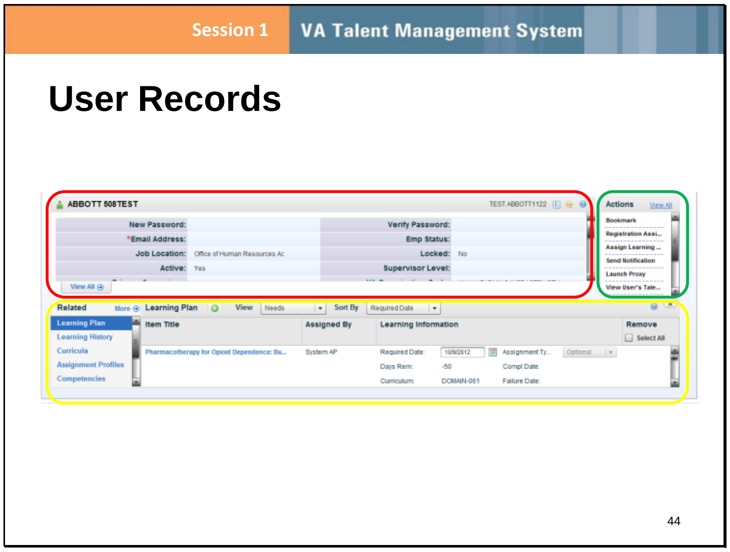


Slide 44: User Records

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Slide 45: Demonstration: User Records

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## Demonstration: User Records

**To locate and view a user record:**

1. Navigate to **Users > Users**.
2. Enter your search criteria in the appropriate textboxes.
3. Select **Search**.
4. Locate your user from the search results list.
5. Select a User ID to open the record.
6. Once the user record is displayed, review the three main areas of the record – Core, Related, and Actions.

**Core Area**

1. The **Core** area contains the basic information of the user record, including the user's name, position, email, organization, supervisor, and job code. To edit any field in this area, simply select in a displayed field and enter text or select a reference value (depending on the field type). You can also view and enter additional information by selecting **View All** located at the bottom left of the Core area. Once expanded, the screen displays the following sections where updates can be made:
   - Summary: name, position, domain, supervisor, job code, email, organization
   - Extended Summary: active, role, coach, custom columns
   - Employment: employment status, type, hire date, job location, job title, region, prior service time, related instructor, résumé
   - Reset Password: enter and confirm new password
   - Compensation Information

**Related Area**

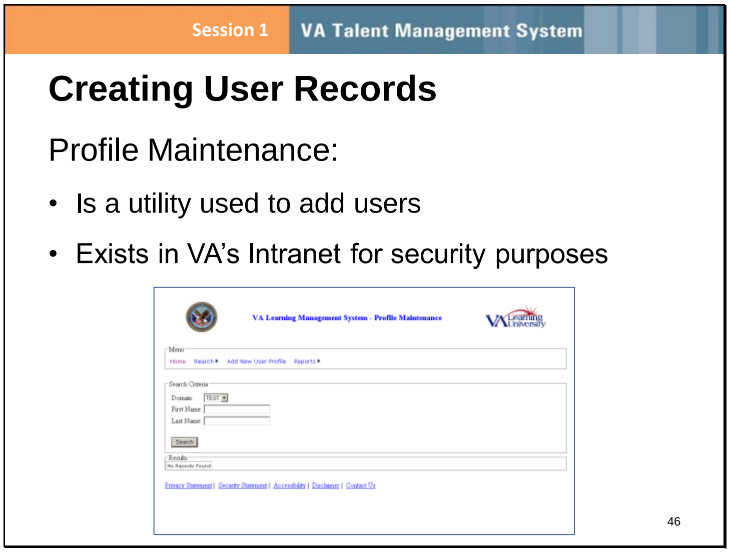
1. The **Related** area of the user record contains additional information regarding the user. The related area displays a list of items that administrators use most frequently when interacting with the user record. Select a **Related** tab on the left (e.g.,To-Do List) to display the details on the right.
   - The **To-Do List** tab is used to assign items to a user's To-Do List and manage a user's assigned items.
   - The **Learning History** tab is a transcript of all the items a user has ever taken.
   - The **Curricula** tab is used to assign curricula as well as manage all of the curricula that are assigned to the user, regardless of how the curricula were assigned.
   - The **Assignment Profiles** tab is used to review all of the assignment profiles to which a user belongs.
   - The **External Requests** tab is used to add, edit, approve, and withdraw the user's External Requests (a form used when users want to attend a training event that is not managed by the VA TMS).

2. Select **More** to see additional Related tabs. The **More** link displays a list of items that administrators need but use less frequently. (The Related and More displays are configured in **System Admin > Configuration > Record Configuration**.) Options available under **More** include:
    - The **Surveys** tab is used to view information about surveys associated with the user and details for the items that are associated with each survey. When a user completes an item that is associated with a survey, SuccessFactors Administration adds the survey to this tab. When a user completes the survey, SuccessFactors Administration removes the survey from this tab
    - The **Requests** tab is used to view the requests that a user made from the user interface for instructor-led or blended items
    - The **Registration** tab is used to view the user's scheduled offering registrations
    - The **Account Code** tab is used to select an authorized account code to associate with a user so that the user can purchase items that have a price using the chargeback payment method
    - The **Preferences** tab is used to set or change a user's time zone, currency, locale, and locale format options
    - The **Phone Numbers** tab is used to create or manage the different phone numbers that are associated with a user
    - The **Organization Dashboard** tab is used to manage a user's ownership privileges for dashboards
    - The **Online Status** tab is used to review any of the items that 1) are assigned to the user's To-Do List and 2) have online content
    - The **Commerce** tab is used to edit the user's shopping account, billing, and shipping information
    - The **Catalog Preview** tab lists all the catalogs that a user can access
    - The **Assessments** tab is used to track a user's progress and statistics regarding his or her competencies
    - Some items require that users receive approval before they gain access to the item. In these situations, users must request approvals, which administrators can review from the **Approvals** tab
    - The **Approval Role** tab is used to associate the user with an approval role so that an administrator can assign the role to the user for an approval process
    - The **Alternate Job Code** tab is used to add and edit alternative job codes (also called secondary job codes) that are associated with a user; you can find a user's primary job code in the Job Code box on the Summary tab (Core area)

**Actions Area**

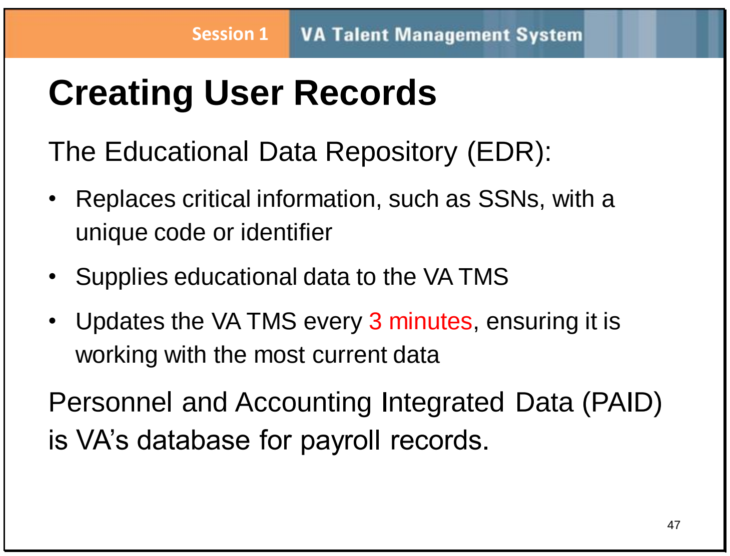
1. The **Actions** area of the user record contains links to additional actions that can be taken on the user record, including:
    - Bookmark (add the user to the admin bookmarks)

- Registration Assistant (initiates the Registration Assistant tool)
- Assign Learning Needs (initiates the User Needs Management tool to enable you to batch assign items and curricula to one or more users)
- Send Notification (initiates the ad hoc notification wizard)
- Launch Proxy (initiates proxy feature)
- Manage Alternate Supervisor (allows you to identify alternate supervisor for user)
- Reset User Pin (resets the user's pin)
- data.workflow.VALearningHistoryReport (allows you to generate the Learning History report)



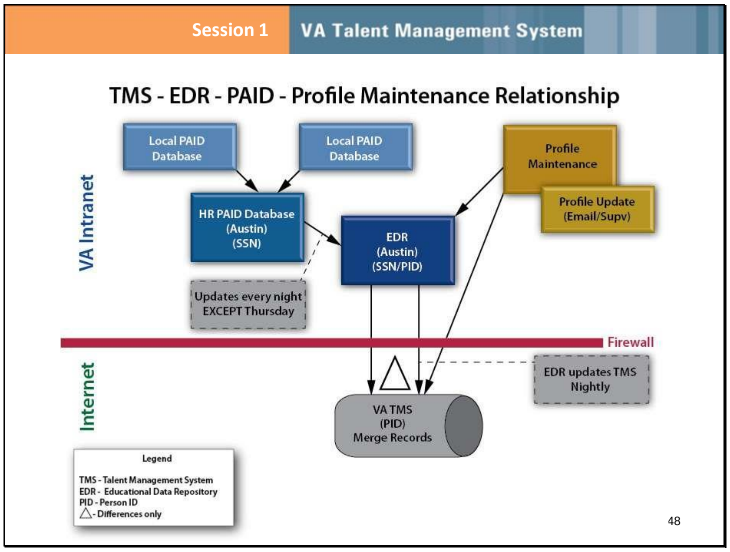

Slide 46: Creating User Records

Notes:



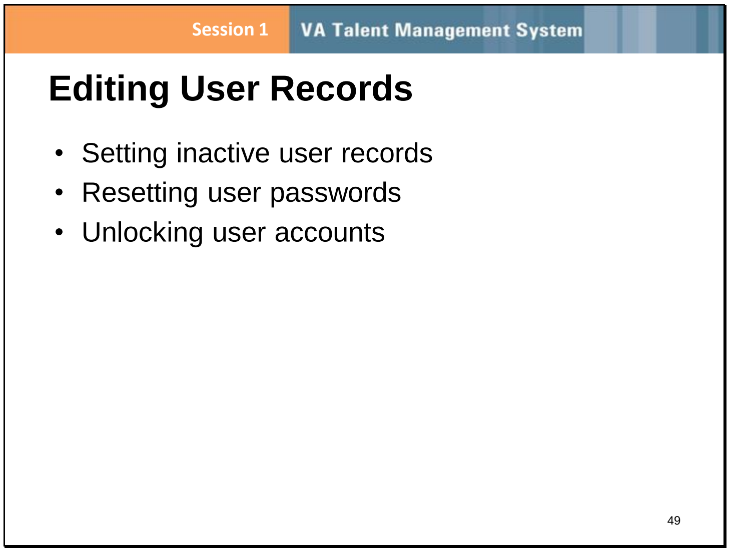

Slide 47: Creating User Records

Notes:




Slide 48: TMS-EDR-PAID-Profile Maintenance Relationship

Notes:




Slide 49:Editing User Records

Notes:


Slide 50: User Records

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## Demonstration: User Records

**Adding Users to the VA TMS:**

1. Users may be added to the VA TMS manually by an admin or automatically through a Human Resource System (HRS), possibly using the **Connectors** tool (**System Admin > Connectors**). **NOTE:** Reference the Connectors Guide for additional information on the standard connector framework.
2. If new user records are entered manually, follow your organization's business rules or establish a naming convention for user IDs to maintain consistency and usability. The VA TMS requires that each user record contain a unique user ID. The user ID is used as the login ID for the VA TMS.

   **Example user ID:** LMSUSER.USER0230
3. All user records are assigned to a domain. The domain is a way to show administrative ownership, and it determines which admin(s) will manage the user record. If the user's record is assigned to the "Public" (or Default) domain, the record will be editable by all admins given the right to edit any user records in the system. When adding user records to the VA TMS, always specify the domain to which the user record should belong. All fields indicated with a red asterisk (*) are required and must be completed when adding records to the VA TMS.

**To locate and view a user record:**

1. Navigate to **Users > Users**.
2. Enter your search criteria in the appropriate textboxes.
3. Select **Search**.
4. Locate your user from the search results list.
5. Select a **user ID** to open the record.

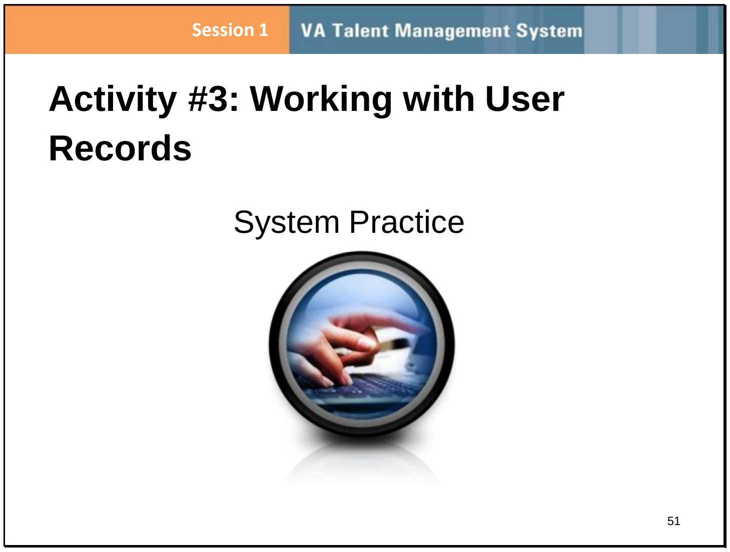
**Show how to do each of the listed tasks in the Edit view of a user's record:**

- Set inactive user records

An inactive user will keep the records intact. For example, if a user takes extended leave but is expected to return, you can make the user inactive. When you make users inactive, the system does not send, and users do not receive, automated notifications. Inactive users cannot log in to the user interface.

- Change a user's primary supervisor

**NOTE:** Owing to the large number of employees, new user accounts are created by the VA TMS administrator.



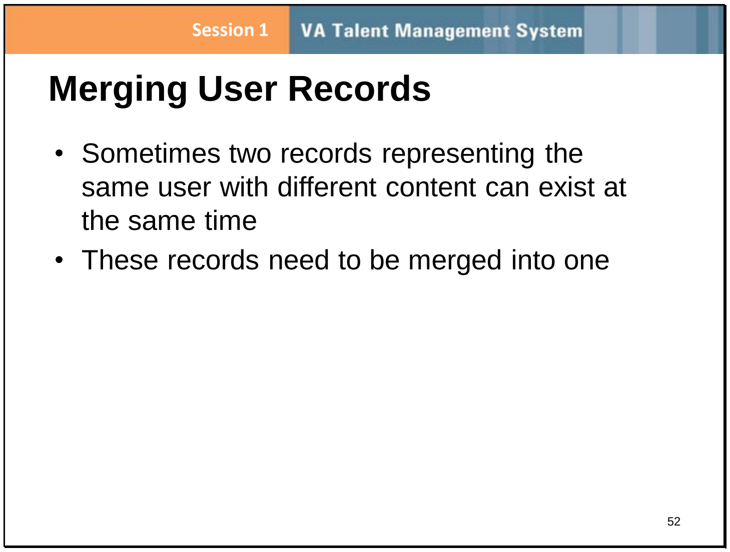

Slide 51: Activity #3: Working with User Records

Notes:

### Activity #3: Working with User Records

1. Navigate to **Users Menu** tab.
2. Search for users whose last names begin with the same letter as your own.
3. Select a user by selecting on the **user ID** link.
4. Explore the **To-Do List** and **Learning History** sections of the **Related** area for the user selected.
5. Launch a proxy for the user.

The Job Aid: Add and Edit User Records is available in the VA TMS.




Slide 52: Merging User Records

Notes:


Slide 53: Demonstration: Merging User Records

Notes:

### Demonstration: Merging User Records

When there is more than one report for the same user, DMs will need to consolidate the reports into one. The primary and secondary user records are known as **Merge Into** and **Merge From**, respectively. In other words, the primary user record is the one that will receive the content from the secondary user record.

There are specific merge rules for how the records are affected.

**WARNING:** If the secondary user record has an account, this action will remove the user's association with any content that has been added. This cannot be undone.

**How to merge two user records:**

1. Navigate to **Users**.
2. Select **Tools**.
3. Select **Merge Users**.
4. Enter search criteria for duplicate users in VA TMS.
5. Select the primary, or "Merge Into," record, and the secondary, or "Merge From," record.
6. Select **Merge**.
7. Review the merge.
8. Select the **Details** icon in each row for additional information about the merge.


Slide 54:Activity #4: Merging User Records

Notes:

### Activity #4: Merging User Records

1. Navigate to **Users**.
2. Select **Tools**.
3. Select **Merge Users**.
4. Enter search criteria for duplicate users in VA TMS.
5. Select the primary, or “Merge Into,” record, and the secondary, or “Merge From,” record.
6. Select **Merge**.
7. Review the merge.
8. Select the **Details** icon in each row for additional information about the merge.


Slide 55: Demonstration: Admin Records

Notes:

### Demonstration: Admin Records

In the **System Admin** section, you can manage how the VA TMS looks and functions. Selecting the **System Admin** button automatically takes you to the **Application Admin** tab which is the **Admin Management** view.

**Adding new admin accounts:**

When creating new admin accounts, you will need to identify an individual's administrative role(s). The assigned roles will determine the different permissions in the VA TMS that the admin will be able to see and perform. There are currently seven primary VA TMS administrator roles and five additional, or secondary, administrator roles, which are referred to as add-on roles. Usually, an administrator will receive a primary role along with a secondary role. However, an add-on role may function independently.

**Considerations when granting permissions:**

Only VA DMs have the privilege to create new admin records. It is extremely important that DMs exercise restraint in creating and granting VA TMS admin permissions. There should rarely be more than two DMs for any domain.

LMs have almost all the permissions of DMs, and there should be a limited number of LMs for any domain. Similar consideration should be used for more restricted admin accounts, such as Item Manager and Assignment Manager. You should have as few administrators in a domain as possible. This helps prevent redundancy and ensures accuracy in the records created in the VA TMS.

**Naming convention for admin IDs:**

Performance requires that each admin record contain a unique admin ID. The admin ID is used as the login ID for VA TMS. The admin ID uses the same naming convention as the user ID.

- LASTNAME.FIRSTNAMEmmddt
- mm = two-digit month of birth
- dd = two-digit date of birth
- t = tie breaker character, if necessary
- Example: EDMONDS.BLAKE0416

**To add a new admin record:**

1. Navigate to the **Admin** screen.
2. Select **System Admin**.
3. Select **Add New**.
4. Create an admin ID.
5. Select a domain.

   **NOTE:** All records are assigned to a domain. The domain is a way to show administrative ownership and determines which admin(s) will manage the record. When adding admin records, always specify the domain to which the record should belong.
6. In the **New Password** textbox, enter the default password, “Password#1”.
7. In the **Verify Password** textbox, enter the password again.

8. Select the **Add** button.

All fields indicated with a red asterisk (*) are required and must be completed when adding records to the VA TMS.

Although there is no red asterisk (*) for Last Name, First Name, and E-mail Address, these fields are required by VA business policy.

The new administrator will be prompted to change the password when he or she logs in for the first time.

9. After you create an admin record, you will be taken to the **Summary** view, which allows you to edit the record, unlock accounts, and reset passwords.
10. On the **Summary** tab you may edit information about the administrator, and you may delete the account as required.

Once an administrator's record has been deleted, it can be reinstated by reentering his or her admin ID as a new account. The VA TMS will warn you that the old record exists and give you the option of recovering the old account.

**Admin record: main tabs**

After an admin record has been identified, new tabs appear: **Summary**, **Assigned Roles**, and **Preferences**.

For each tab of an admin record, the following tasks can occur:

- The **Summary** tab allows you to set an administrator's personal information, lock an admin account to remove login privileges without changing the administrator's information, and reset passwords.
- The **Assigned Roles** tab allows you to set the administrator's role(s), which determine(s) the functions the admin will be able to perform.
- The **Preferences** tab allows you to set locale preferences of the administrator (such as locale and time zone). The only Active Locale ID available is English.

**Editing admin records:**

To edit admin records, follow these steps:

1. Navigate to the **System Admin** screen.
2. Select **Application Admin**.
3. Find the admin record using the **Search** wizard.
4. Select the **Edit** icon.
5. From this page, you can edit the following characteristics of the administrator's record:
    - Last name
    - First name
    - Middle initial (MI)
    - E-mail address: This field is completed with the new administrator's e-mail address
    - Reply to address: This is the e-mail address used when a user replies to a notification. Leave the **Reply to Address** blank
    - E-mail nickname: This name will appear in e-mail notifications. The e-mail nickname can be completed with the new administrator's first name or some other nickname
    - Domain
    - Related user: The related user is an end user ID. When you add a user ID in the **Related User** box, you create a relationship between the two IDs. The relationship allows the admin to switch quickly between user and administrator roles without logging in again, but the two IDs are still treated separately by the VA TMS
    - Unlock or lock accounts
    - Reset passwords

**Locking admin accounts:**

If the administrator has unsuccessfully attempted to log in five times, his or her account will be locked and the **Locked** checkbox will be checked on the **Summary** tab. To unlock the admin account, it will then be necessary to uncheck the box and reset the admin's password to the default "Password#1". If you reset the password without unchecking the box, the account will remain locked.

You have to select **Apply Changes** in the section with the Locked checkboxes as well as in the section where you reset the password.

**Assigning roles**

In order to receive permissions for different admin roles in the VA TMS, the creator of the record has to assign the Role IDs.

To assign administrator roles to an admin record:

1. Identify the administrator's record you want to edit.

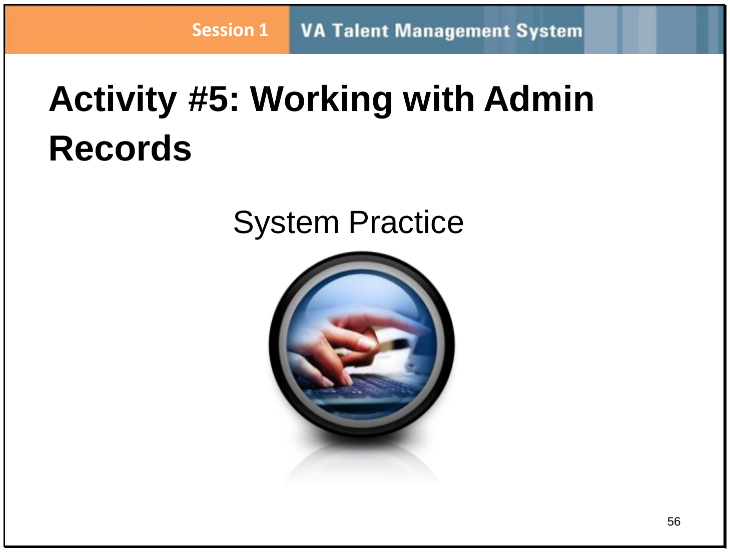
   **NOTE:** To learn more about the roles, see the chart in the appendix of this document: VA TMS Functions and Associated Roles.
2. Select the **Assigned Roles** tab.
3. Enter the exact **Role ID**. (If you do not know the Role ID, select the **add one or more from list** link. Select the **Search** button, which will give you all the Role IDs available. Check the role(s) you want to assign to the admin).
4. Select **Add**.
5. Repeat steps 2 and 3 until all the required roles appear at the bottom of the content frame.

**Setting the Preferences:**

For every admin record, the **Preferences** tab has two required fields: the **Active Locale ID** and the **Time Zone ID**. The first is the Active Locale ID field, and "English" is the only available option for this field.

**The Time Zone ID** field is very important and must be set to the administrator's local time zone. If this field is left blank, the system will default to Eastern Standard Time. The checkbox to the right of the **Time Zone ID** field should be checked, as the system uses the Time Zone ID to compute start times in scheduled offerings. When checked, the scheduled offerings will always display according to the Time Zone ID.

The **Currency ID** appears as a third required field. However, VA does not use the system's commerce capabilities so this field does not need to be completed. The Currency ID has been disabled.




Slide 56:Activity #5: Working with Admin Records

Notes:

### Activity #5: Working with Admin Records

**Locate and view an admin record:**

1. Navigate to the **Admin** screen.
2. Select **System Admin**.
3. Enter your search criteria in the appropriate text boxes.
4. Select **Search**.
5. Locate your user from the search results list.
6. Do one of the two things:

   To access the record in view only mode, select the **View** icon.

   OR

   To access the record in edit mode, select the **Edit** icon.

**Add an admin record:**

1. Navigate to the **Admin** screen.
2. Select **System Admin**.
3. Select **Add New**.
4. Enter an admin ID.
5. Enter the admin’s last name, first name, and middle initial (MI).
6. Select a domain for the admin.
7. Enter the related user.
8. Enter the admin’s e-mail address, reply-to address, and add a nickname for the e-mail.
9. Enter a new password then verify it.
10. Select **Add**.
11. Record the admin ID.
12. Assign the role of the admin as an Item Manager and Scheduling Manager. (If you do not know the ID, select the **add one or more from list** link.)

**Activity:**

Make the admin you just created a subordinate of the admin indicated by your instructor. Determine where that information goes on the **Summary** tab, select the admin’s supervisor, and select **Apply Changes**.

Session 1 VA Talent Management System

## Knowledge Check

The Learning History tab in the Related area displays those items a user has completed, including the date those items were completed.

a) True

b) False

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Slide 57: Knowledge Check

Notes:

Session 1 VA Talent Management System

## Knowledge Check

Which of the following is not a required field in the user record?

a) User ID
b) Email address
c) Domain
d) Role
e) All of the above

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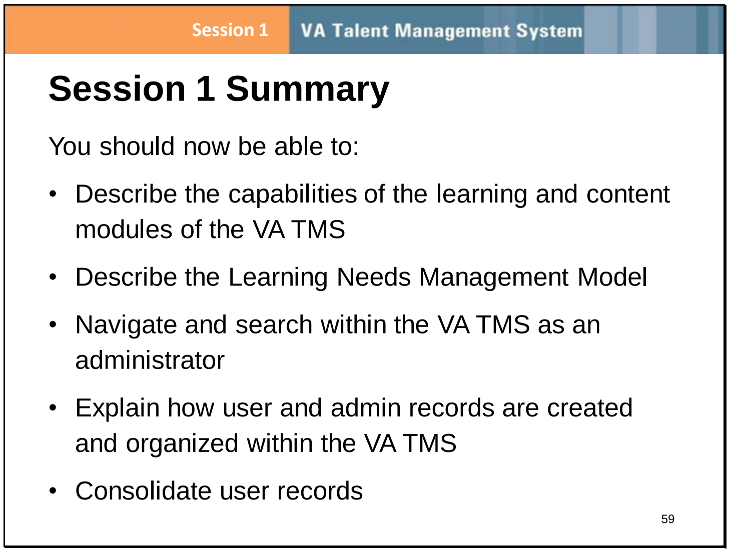
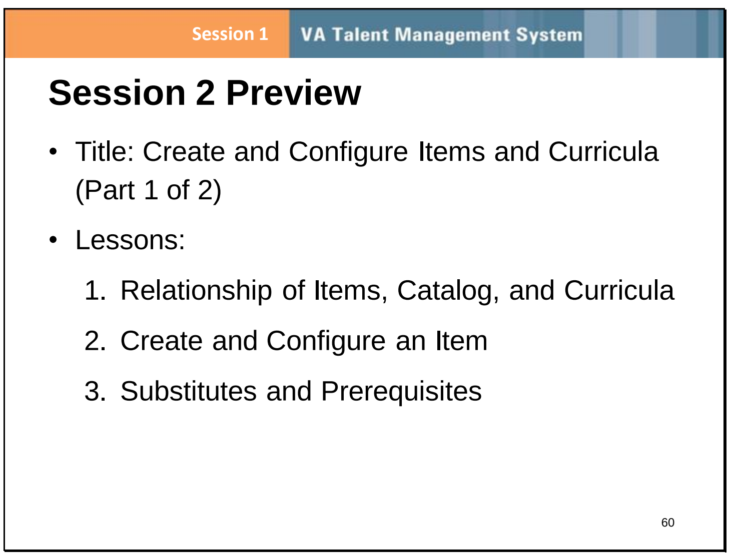
Slide 58: Knowledge Check

Notes:




Slide 59: Session 1 Summary

Notes:




Slide 60: Session 2 Preview

Notes:


Slide 61: Questions

Notes: